



Quick Look at Adding or Removing Staff

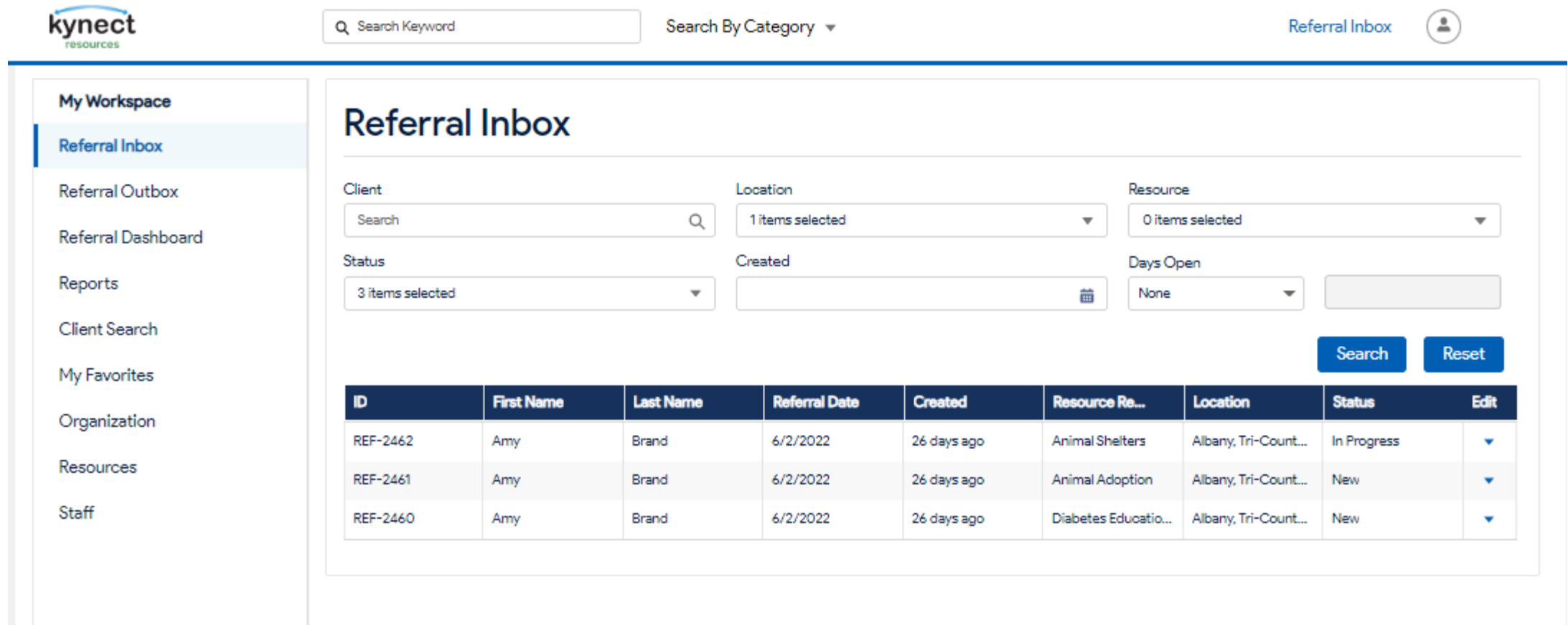
Use this Quick Look Guide to learn how to add, edit or remove staff members to **kynect resources**.

Adding Staff



In this Guide, you will learn how to add staff in **kynect resources**, as well as how to edit and maintain accounts for staff.

Begin by logging in to **kynect resources**. The Referral Inbox is the starting page upon log in.



The screenshot shows the 'Referral Inbox' page in the kynect resources application. The left sidebar contains a 'My Workspace' menu with options: Referral Inbox (selected), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The main content area has a search bar and filters for Client, Location, Resource, Status, Created, and Days Open. Below the filters is a table with 9 columns: ID, First Name, Last Name, Referral Date, Created, Resource Re..., Location, Status, and Edit. The table contains 3 rows of data.

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Adding Staff



To Add Staff, click the Staff link in My Workspace

kynect resources Search Keyword Search By Category Referral Inbox

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search
- My Favorites
- Organization
- Resources
- Staff**

Referral Inbox

Client Location Resource

Status Created Days Open

Search

1 items selected

0 items selected

3 items selected

Search Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Adding Staff



The **Team** screen displays the staff members, if any, who have been previous added.

To add a new staff member, click the **Add User** action button.

First Name	Last Name	Primary Location	Role	Training Compl..	Phone No.	Status	View
Julie	Macaron	Albany, Tri-County An...	Admin	Not Complete	(895) 412-3695	Active	▼
Test	Test		Admin	Not Complete	(434) 564-5645	Active	▼
Tracy	Williams	Albany, Tri-County An...	Admin	Not Complete	(317) 517-1461	Active	▼

Adding Staff



On the Team Member Details screen, enter the Contact information for the staff member.

Tips:

Use the correct spelling of Names

Use the employee's organization email

Use the best Phone Number to contact the member if needed

Team Member Details [X]

Contact

* First Name [Text Box] * Last Name [Text Box]

* Email Address [Text Box] * Phone Number [Text Box]

User Details

* Primary Location [None ▼] * Permissions [None ▼]

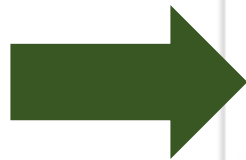
* Status [Active ▼]

[Cancel] [Save]

Adding Staff



Next, in the **User Details** fields, select the **Primary Location** for the staff member.



Team Member Details

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

None

None

Lee County

Albany, Tri-County Animal Shelter

* Permissions

None

Cancel

Save

Adding Staff



Select the **Permissions** level for the staff member then click **Save**.

Team Member Details

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

Lee County

* Status

Active

* Permissions

None

None

Admin

Staff

Cancel Save

The staff role can:

- Create referrals
- Respond to referrals
- Search for residents and view resident detail or OneView screen
- View organization Dashboard
- Create Favorites list of organizations

The admin role has access to all staff level functionality Plus:

- Admin users can add and edit staff
- Manage and edit the organizations profile
- Add and edit resources offered

Note: There is no limit for the number of staff members that may be added. It is recommended to have more than one Admin, if possible, to allow for continuity during unexpected staff changes.

Adding Staff

kynect resources will send a Welcome email to the added staff member with next steps to complete Onboarding

Important Note: Users with an existing Kentucky Online Gateway (KOG) account **MUST** use the link specified in the Welcome email message.

This assigns the correct role in **kynect resources** and adds the Resources Community Portal widget to the KOG homepage.

The link is time sensitive. Onboarding steps must be completed within 24 hours of clicking the link.

Ask staff member to check their spam folder if they do not receive the email.



Edit or Remove Staff



To edit Team Member Details or to remove staff access, navigate to the Staff link in My Workspace.

Search By Category ▼

Referral Inbox

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Inbox

Client

Location

1 items selected ▼

Resource

0 items selected ▼

Status

3 items selected ▼

Created

Days Open

None ▼

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Edit or Remove Staff



Use the drop-down arrow in the **View** column for the selected Team member and click **Edit**.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

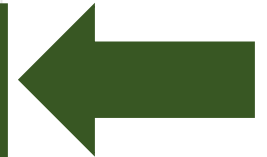
Staff

Team

All Locations

Add User

First Name	Last Name	Primary Location	Role	Training Compl...	Phone No.	Status	View
Julie	Macaron	Albany, Tri-County An...	Admin	Not Complete	(895) 412-3695	Active	▼
Test	Test		Admin	Not Complete	(434) 564-5645	Active	Edit
Tracy	Williams	Albany, Tri-County An...	Admin	Not Complete	(317) 517-1461	Active	▼



Edit or Remove Staff



In the User Details section, use the drop-down arrows to assign a different Primary Location, change Permissions level, or Status.

Team Member Details

Contact

* First Name

Julie

* Last Name

Macaron

* Email Address

juliemacaron@dispostable.com

* Phone Number

(895) 412-3695

User Details

* Primary Location

Albany, Tri-County Animal Shelter

* Permissions

Admin

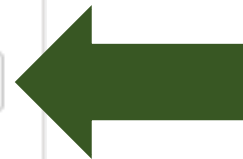
* Status

Active

☐ Training Complete

Cancel

Save



Edit or Remove Staff



When a Staff member with existing Staff Permissions needs to be changed to Admin Permissions, the member must first be deactivated by the Admin using the Status field.

The Admin may then Add User and assigned the Admin Permissions.

Team Member Details

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

* Permissions

None

None

* Status

Active

Active

Inactive

Cancel

Save

Team Member Details

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

Lee County

* Status

Active

* Permissions

None

None

Admin

Staff

Cancel

Save

Edit or Remove Staff



Click Save to apply the changes or edits.

Team Member Details

Contact

* First Name

Julie

* Last Name

Macaron

* Email Address

juliemacaron@dispostable.com

* Phone Number

(895) 412-3695

User Details

* Primary Location

Albany, Tri-County Animal Shelter

* Permissions

Admin

* Status

Active

☐ Training Complete

Cancel

Save



Thank you

For additional support, please use the Help section in **kynect resources** or email kynectresources@ky.gov